



USOE
SIS 2000+
Food Service

Food Service



Food Service Module

Select - **Administration** - Module



Select - **Rates** - Module



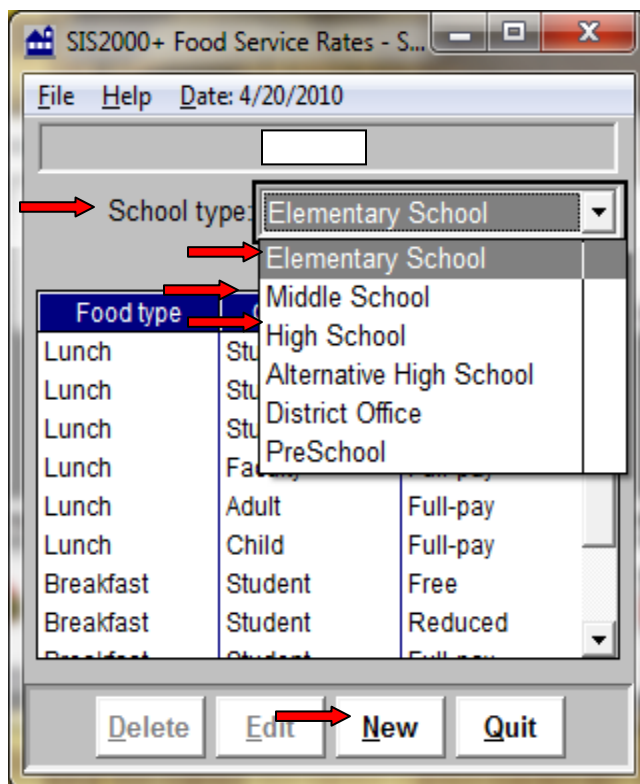


Rates Module

Lunch and **Breakfast** Rates are tied to **School Types**.

School Types Setup:

If you only have one **School Type** (**Elementary**, **Middle School**, or **Secondary**), you only need to setup one **School Type**. If you have more than one, setup all that apply to your LEA.



Select the **School Type** that your LEA will be using. If your LEA is an **Elementary School** – Select **Elementary School** from the drop-down menu

Select - **New:**

Each **Food Type**, **Consumer Type**, and **Pay Type** is selected each time a new **Rate** is setup.



SMP Milk is listed in the Food Type List

SMP Milk is only used if you participate in the **Special Milk Program (SMP MILK)**.

SMP Milk is a reimbursable Milk Item.

To use SMP Milk – contact **Child Nutrition Services** at USOE at (801) 538-7680 for more information, otherwise do not set it up.

Elementary School Type - Setup

Rate for: **Elementary School** is selected

Food Type - **Lunch**

Consumer Type - **Student**

Pay Type - **Full-pay**

SIS2000+ Food Service Rates

Rate for: Elementary School

Food type: Lunch

Effective	Expire	Rate 1
		0.00

Consumer type: Student

Pay Type: Full-pay

Buttons: Add, Remove, Undo, Save, Close, School Rates

Food Type, Consumer Type, and Pay Type have drop-down menus for flexibility for selecting different Rate options.

Do **not** enter an **Effective** date **at this time**.

Rate 1 - Reimbursable Rate turned in for reimbursements.

Put in the amount you will charge students for **Full pay** Lunch.

Rate 2 - student(s) who eat a second meal or Faculty, Child, Worker, or Patron(s). These meal rates are not reimbursable. This is an optional field. If you do not serve second meals, etc. just leave it at 0.00.

Rate 2 - meals can include Full-pay amount **plus** cost to prepare. It can be more depending on what you want to charge. If you have questions about this, contact **Child Nutrition Services** at USOE for more information at (801) 538-7680.

Worker - worker rate (Not reimbursable) - optional field.

If you do not serve worker meals, just leave it at 0.00.

Tot Reim (bursement) leave **blank**.

Chg By ((Data Changed By) - LovAs

Chg Date - 4/21/2010 - (Date the meal Rate was changed)

The screenshot shows a software interface for setting school rates. At the top, there are four dropdown menus: 'Rate for:' (set to 'Elementary School'), 'Food type' (set to 'Lunch'), 'Consumer type' (set to 'Student'), and 'Pay Type' (set to 'Full-pay'). Below these is a table with columns: 'Effective', 'Expire', 'Rate 1', 'Rate 2', 'Worker', 'Tot Reim', 'Chg by', and 'Chg date'. The first row of the table contains the values: '2.00', '2.00', '0.00', and 'LovAs' in the 'Chg by' column, and '4/21/2010' in the 'Chg date' column. At the bottom of the form are buttons for 'Add', 'Remove', 'Undo', 'Save', 'Close', and a 'School Rates' button. Red arrows point from the text instructions above to the corresponding fields in the form: 'Rate 1' to the first 'Rate 1' cell, 'Rate 2' to the first 'Rate 2' cell, 'Worker' to the first 'Worker' cell, 'Chg By' to the 'Chg by' column header, and 'Chg Date' to the 'Chg date' column header. A red arrow also points to the 'Effective' column header.

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
		2.00	2.00	0.00		LovAs	4/21/2010

The only time to enter an **Effective** date is when you are going to change rate amounts.
Example: If you change a Meal Rate from \$1.85 to \$2.00 or an ala Carte Item - Milk .25 to .35, etc.



Changing Meal Rates

Select the **Administration** Module / **Items** Module:

File Help Date: 4/21/2010

Item type: Breakfast Item Description: Breakfast Location(s): Sani-Tooele High Meal(s): Breakfast

Override Meal Rates:

Consumer	Effective	Expire	Rate 1	Rate 2	Worker	Chg by	Chg date
Student	8/1/2008 12	9/1/2009 12	1.85	1.85	0.00	LovAs	4/21/2010 1:
Student	9/2/2009 12		2.00	2.00	0.00	LovAs	4/21/2010 1:

Add Remove

Print Find List Delete Undo New Save Quit

Find the **Description** and **Food Type**. Select the **Rate** amount you are going to change.

Select **Edit** –

Select the **Item** you wish to change the **Rate** for. Put in the Effective date **and** the Expire date. The effective date should be before school started or the first day of school. This rate change will affect the rates by date. The rates are 'date driven'.

A word of caution, if you are not sure how to set this, please contacts your USOE SIS2000+ Specialist for help. Changing these rates can be retroactive.

The **new** Effective Date should be entered with the new Rates. The date you want the rate to take effect.

Effective – 8/01/2008 -- Expire -09/01/2009 – **Rate 1** - \$1.85

Effective – 9/02/2009 -- Expire – (blank) – **Rate 1** - \$2.00

See example above.

Select - **Save**



Adding more Meal

Repeat the steps to add more Meal Rates: See examples below:

Complete the setup for the following Rates for **Lunch**:

Food Type - Lunch - Consumer Type - Student - Pay Type -**Free**

Food Type - Lunch - Consumer Type - Student - Pay Type -**Reduced**

Food Type - Lunch - Consumer Type Student - Pay Type -**Full-pay**

Rate for: Elementary School - Pay Type: **Free**

Rate for:		Food type	Consumer type	Pay Type
Elementary School		Lunch	Student	Free

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
		0.00	2.85	0.00		PalCa	7/27/2009 1:

Rate for: Elementary School - Pay Type: **Reduced**

Rate for:		Food type	Consumer type	Pay Type
Elementary School		Lunch	Student	Reduced

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
		0.40	2.85	0.00		PalCa	7/27/2009 1:

Rate for: Elementary School - Pay Type: **Full -pay**

Rate for:		Food type	Consumer type	Pay Type
Elementary School		Lunch	Student	Full-pay

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
		2.85	2.85	0.00		LovAs	4/20/2010 1:

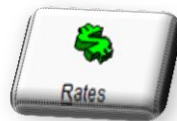
Breakfast Rate for Elementary School Setup

Repeat the steps for Breakfast if you are planning to serve **Breakfast**.

Food Type - Breakfast - Consumer Type - Student - Pay Type - **Free**

Food Type - Breakfast - Consumer Type - Student - Pay Type - **Reduced**

Food Type - Breakfast - Consumer Type - Student - Pay Type - **Full Pay**



Adult, Worker, Child (Non student)

Not Reimbursable Rates:

Rates such as: **Faculty, Adult, Child** are optional.

If you will not use them, don't set them up.

Rate 1 is grayed out because **Rate 1** is a reimbursable meal rate. You can't put a reimbursable Rate amount in **Rate 1** field for Faculty and Child lunches, breakfasts, etc. These meal types are **not** reimbursable by the state.

Setup: Rate for Elementary School–Food Type: Lunch- Consumer Type: **Adult - Pay Type: Full-pay**

Rate for: Elementary School **Food type:** Lunch **Consumer type:** Adult **Pay Type:** Full-pay

Effective	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
	0.00	3.50	0.00		LovAs	3/30/2010 1

Buttons: Add, Remove, Undo, Save, Close, School Rates

Setup: Rate for: Elementary School–Food Type: Lunch- Consumer Type: Adult – Pay -Type: Full –pay for a **Worker. Rate 2 entered.**

The screenshot shows the 'School Rates' window. At the top, there are four dropdown menus: 'Rate for:' (Elementary School), 'Food type' (Lunch), 'Consumer type' (Adult), and 'Pay Type' (Full-pay). Below these is a table with columns: Effective, Expire, Rate 1, Rate 2, Worker, Tot Reim, Chg by, and Chg date. The first row has Rate 1 as 0.00, Rate 2 as 0.00, and Worker as 2.50. The 'Chg by' field contains 'LovAs' and the 'Chg date' is '3/30/2010'. At the bottom, there are buttons: Add, Remove, Undo, Save, Close, and a 'School Rates' button.

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
		0.00	0.00	2.50		LovAs	3/30/2010 1

Setup for: Rate for: Elementary School–Food Type: Lunch- Consumer Type: **Child - Pay -Type: Full –pay for a **Child**. Rate 2 entered.**

The screenshot shows the 'School Rates' window. At the top, there are four dropdown menus: 'Rate for:' (Elementary School), 'Food type' (Lunch), 'Consumer type' (Child), and 'Pay Type' (Full-pay). Below these is a table with columns: Effective, Expire, Rate 1, Rate 2, Worker, Tot Reim, Chg by, and Chg date. The first row has Rate 1 as 0.00, Rate 2 as 1.60, and Worker as 0.00. The 'Chg by' field contains 'PalCa' and the 'Chg date' is '7/27/2009'. At the bottom, there are buttons: Add, Remove, Edit, Save, Close, and a 'School Rates' button.

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
		0.00	1.60	0.00		PalCa	7/27/2009 1

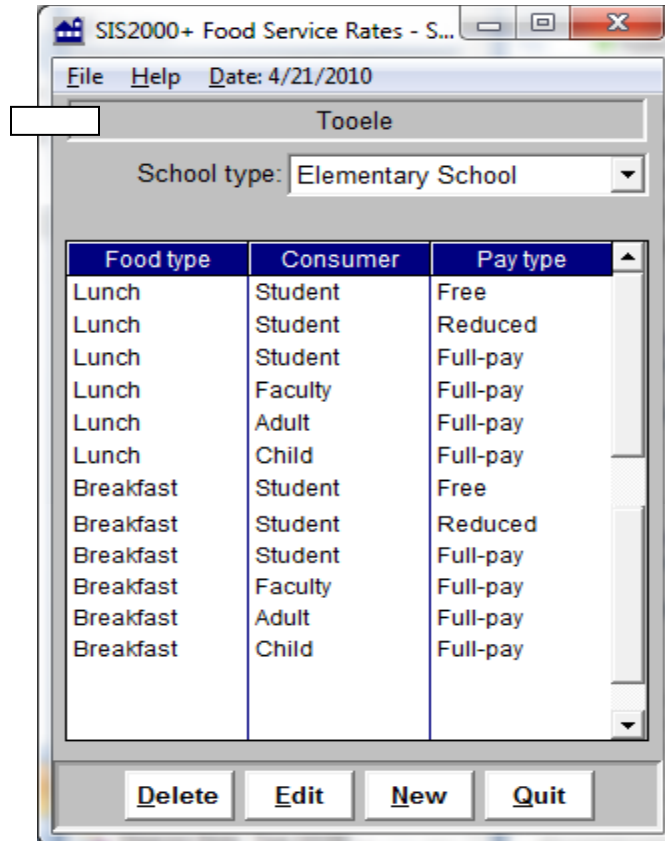
Setup Rate for: Elementary School–Food Type: Lunch- Consumer Type: **Faculty - Pay Type: Full –pay. Rate 2 entered.**

The screenshot shows the 'School Rates' window. At the top, there are four dropdown menus: 'Rate for:' (Elementary School), 'Food type' (Lunch), 'Consumer type' (Faculty), and 'Pay Type' (Full-pay). Below these is a table with columns: Effective, Expire, Rate 1, Rate 2, Worker, Tot Reim, Chg by, and Chg date. The first row has Rate 1 as 0.00, Rate 2 as 2.85, and Worker as 0.00. The 'Chg by' field contains 'PalCa' and the 'Chg date' is '7/27/2009'. At the bottom, there are buttons: Add, Remove, Edit, Save, Close, and a 'School Rates' button.

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
		0.00	2.85	0.00		PalCa	7/27/2009 1

After you have added all Meal Rates for your LEA, the list of rates (Food Types) should look similar to the example below:

Your **Rates** List will only include the Rates you created for your LEA.



Food type	Consumer	Pay type
Lunch	Student	Free
Lunch	Student	Reduced
Lunch	Student	Full-pay
Lunch	Faculty	Full-pay
Lunch	Adult	Full-pay
Lunch	Child	Full-pay
Breakfast	Student	Free
Breakfast	Student	Reduced
Breakfast	Student	Full-pay
Breakfast	Faculty	Full-pay
Breakfast	Adult	Full-pay
Breakfast	Child	Full-pay



Items Module

Select Items:

The first **Item** Rate you will create will be a District-wide Rate Item. A District-wide Rate Item needs to be created for every School Type you setup for both Lunch and Breakfast, if you serve Breakfast. This District-wide Rate Item is created even if you only have one school.

Setting up **Lunch Rate District-wide:**

Select - **New**

Item Type – Lunch

Item Description – Lunch

Location(s) – District-wide

Meal(s) – Lunch

Leave the rest – **blank**

File Help Date: 4/20/2010

Item type: Lunch Item Description: Lunch

Limit Availability: Location(s): District-wide Meal(s): Lunch

Override Meal Rates:

	Consumer	Effective	Expire	Rate 1	Rate 2	Worker	Chg by	Chg date

Add Remove

Print Find List Delete Edit New Save Quit

If you are not serving Breakfast, you do not need to add Breakfast for a Meal Rate. But if you are going to serve Breakfast –

If you serve Breakfast, you will need to repeat the Setup – **District-wide Rate** for the **Breakfast Item**.

Select - New

Item Type – **Breakfast**

Item Description – **Breakfast**

Location(s) – **District-wide**

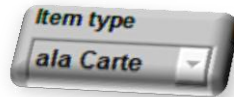
Meal(s) – **Breakfast**

Enter no Rate amounts or Information – This is the way it needs to be setup to work accurately.

The screenshot shows the SIS-2000+ Food Service software interface. At the top, there is a menu bar with 'File', 'Help', and 'Date: 4/20/2010'. Below the menu bar, there are four dropdown menus: 'Item type' (set to 'Breakfast'), 'Item Description' (set to 'Breakfast'), 'Location(s)' (set to 'District-wide'), and 'Meal(s)' (set to 'Breakfast'). Below these menus is a section titled 'Override Meal Rates:' which contains a table with the following columns: 'Consumer', 'Effective', 'Expire', 'Rate 1', 'Rate 2', 'Worker', 'Chg by', and 'Chg date'. The table is currently empty. Below the table are 'Add' and 'Remove' buttons. At the bottom of the window is a toolbar with buttons for 'Print', 'Find', 'List', 'Delete', 'Edit', 'New', 'Save', and 'Quit'. Red arrows point to the 'Item type', 'Item Description', 'Location(s)', 'Meal(s)', and 'Edit' buttons.

Consumer	Effective	Expire	Rate 1	Rate 2	Worker	Chg by	Chg date

After you have setup the District Wide Rates for Lunch and Breakfast,
Add the ala Carte Items (Milk, Rolls, Salad, etc.) you are going to serve:



Adding ala Carte Item Type:

Ala Carte items are for single purchases. If a student only wants milk or a salad, but not the regular meal, you would select the ala Carte Items.



Example: Adding Milk as an **ala Carte Item**:

Select - **New**

Item Type – ala Carte

Item Description – Milk

Location – District-wide

Meal – <Unset> (leave this field unset)

Select **Add**

File Help Date: 4/21/2010

Item type: ala Carte Item Description: Milk Limit Availability: Location(s): District-wide Meal(s): <Unset>

Ala Carte Pricing:

	Effective	Expire	Student	Faculty	Adult	Child	Chg by	Chg date
			0.25	0.25	0.25	0.25	LovAs	4/21/2010 1:

Add Remove

Print Find List Delete Undo Save Quit

Add the amount for a single Milk (.25)

You can add the milk amount to Faculty, Adult, or Child or leave Faculty, Adult, and Child at 0.00. This is optional.

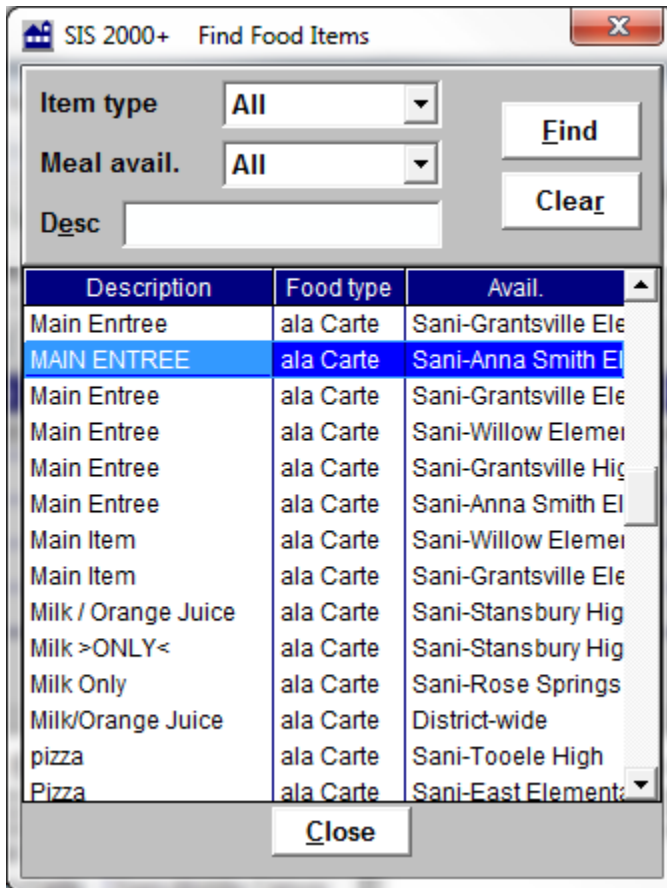
Select - **Save**

Repeat these steps to add more ala Carte Items.

Some Charters/Districts do not serve anyone but students, so you don't need to add the other consumer types.

After setting up your ala Carte Items, your list of rates (Food Types) should look similar to the example below:

It will only list the ala Carte Items you have added for your LEA.



The screenshot shows a window titled "SIS 2000+ Find Food Items". It has a search area with "Item type" and "Meal avail." both set to "All", a "Find" button, a "Clear" button, and a "Desc" text box. Below the search area is a table with three columns: "Description", "Food type", and "Avail.". The table lists various food items, all of which are "ala Carte". The "Avail." column lists the schools or districts where each item is available. The item "MAIN ENTREE" is highlighted in blue.

Description	Food type	Avail.
Main Entree	ala Carte	Sani-Grantsville Ele
MAIN ENTREE	ala Carte	Sani-Anna Smith El
Main Entree	ala Carte	Sani-Grantsville Ele
Main Entree	ala Carte	Sani-Willow Elemei
Main Entree	ala Carte	Sani-Grantsville Hig
Main Entree	ala Carte	Sani-Anna Smith El
Main Item	ala Carte	Sani-Willow Elemei
Main Item	ala Carte	Sani-Grantsville Ele
Milk / Orange Juice	ala Carte	Sani-Stansbury Hig
Milk >ONLY<	ala Carte	Sani-Stansbury Hig
Milk Only	ala Carte	Sani-Rose Springs
Milk/Orange Juice	ala Carte	District-wide
pizza	ala Carte	Sani-Tooele High
Pizza	ala Carte	Sani-East Element



POS Designer Module

Setting up POS Designer (Point Of Service)

After creating the **POS Designer** buttons, they will be displayed and used in the **Cafeteria** Module.

Meal	Lunch								
Description	Lunch								
Page 1	Lunch								
Page 2									
Page 3									
Page 4									
Button Properties Item: Lunch Caption line 1: Lunch Caption line 2: [Edit] [Delete]									
	Lunch	Milk/Tampico							
	Complete meal w/o milk	Cinnamon Roll							
	Specialty Salad w/ bread	Dessert							
	Real meal entree w/side	Fruit or Vegetable							
	Short order entree w/fries	Small Salad							
	Bread/Roll \$.50	Adult Parent Visitor							
		Elementary visitor lunch							
[Back]	[Find]	[Delete]	[Edit]	[New]	[Copy]	[Save]	[Quit]	[Next]	[End]

Select - POS Designer - Module

Administrative	POS Designer	Patrons	Payments	Cafeteria
Class Entry	Accounts	Eligibility	Reports	Quit

Select - **New**

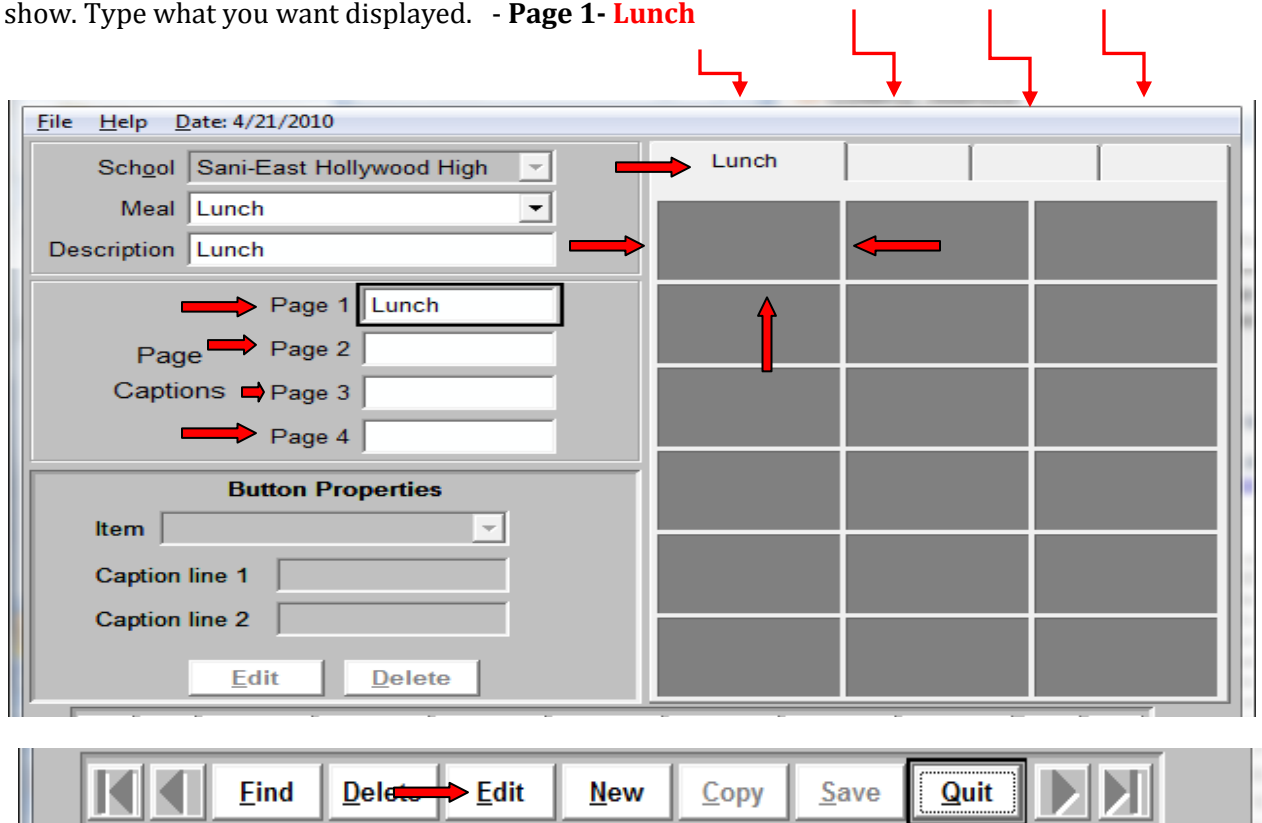
Select **Meal** Type:

Select - Lunch -

Breakfast is setup the same way

Type in **Description** - **Lunch** - This should match the **Meal** Type - **Lunch**

Page 1, Page 2, Page 3, and Page 4 is Tab information displayed across the top where the Tabs show. Type what you want displayed. - **Page 1- Lunch**



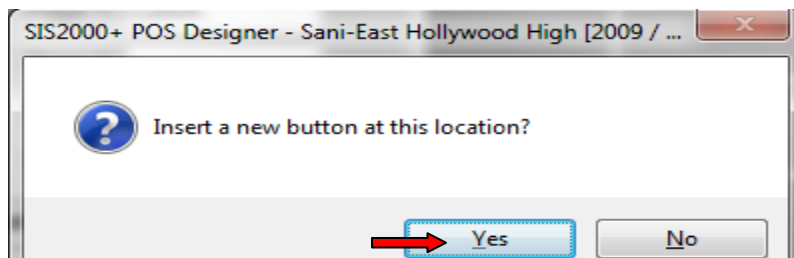
Select - Save

Select - **Edit** to add **POS Design buttons** (displayed and used in the **Cafeteria Module**)

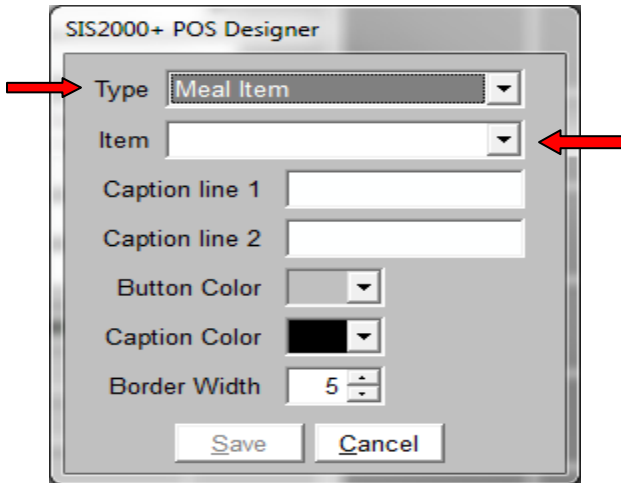
Double Click in the First square on the top – left corner of the grid.

It will ask you if you want to. insert a new button at this location?

Select - **Yes**



POS Designer Button



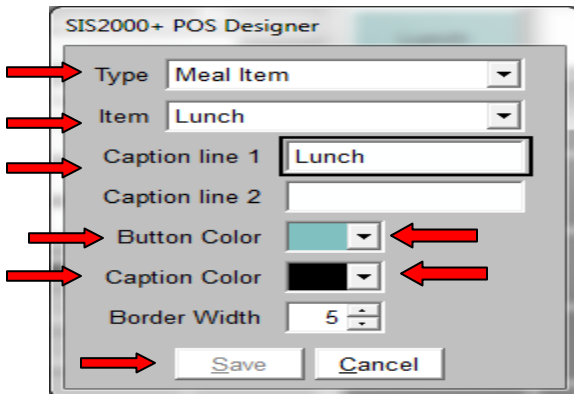
Leave **Type** at – **Meal Item**

Select **Item** from the drop-down menu: select **Lunch**

Type in **Caption Line 1** – **Lunch** (Item and Caption line 1 should match)

Select **Button Color** by selecting the drop-down arrow –select button color

Select **Caption Color** –by selecting the drop-down arrow –select color of the wording

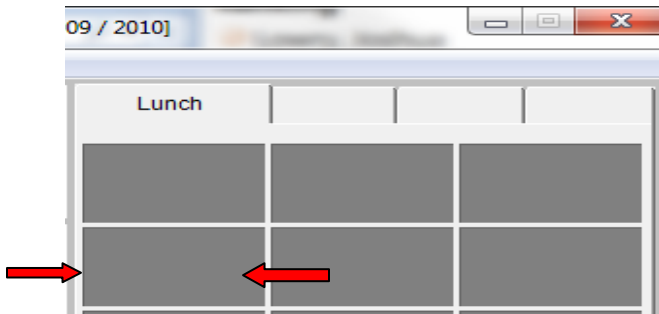


Select - Save

POS Designer button - Milk >Only<:

Select **E**dit

Double click the box on the designer page where you want to add a Milk button:



Select - **T**ype: ala Carte Item

Item – Milk (this will be the name of the item(s) you created earlier in the **I**tems Module).

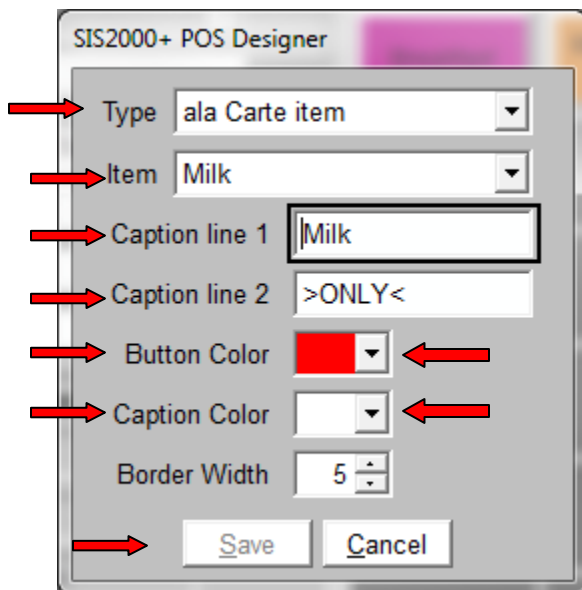
Caption **L**ine **1** – Milk

Caption **L**ine **2** - >ONLY<

Select - **B**utton **C**olor by selecting the drop-down arrow –button color

Select - **C**aption **C**olor by selecting the drop-down arrow -color of the wording

Select - **S**ave



Schgol Sani- Elem

Meal Lunch

Description Lunch

Page 1 Lunch

Page 2

Page 3

Page 4

Button Properties

Item Lunch

Caption line 1 Lunch

Caption line 2

Edit Delete

Find Delete Undo New Copy Save Quit

Lunch

Milk >ONLY<

You can customize your **POS Designer** to fit your LEA: The following are some examples:

File Help Date: 4/28/2010

Schgol

Meal Breakfast

Description Breakfast

Page 1 Breakfast

Page 2

Page 3

Page 4

Button Properties

Item Milk

Caption line 1 Milk

Caption line 2 >ONLY<

Edit Delete

Find Delete Done New Copy Save Quit

Breakfast

Breakfast Milk/Orange Juice

Milk >ONLY<

The top screenshot shows the 'Breakfast' meal configuration. The 'Meal' dropdown is set to 'Breakfast' and the 'Description' field contains 'Breakfast'. The 'Page 1' dropdown is also set to 'Breakfast'. The 'Button Properties' section shows 'Item' as 'Breakfast', 'Caption line 1' as 'Breakfast', and 'Caption line 2' as empty. The grid contains buttons for 'Breakfast' (yellow), 'Milk/Tampico' (red), and 'Free Breakfast week' (pink), 'Adult Breakfast visito' (orange), and 'Elemntary brkfst Visitor' (yellow). The bottom toolbar includes 'Find', 'Delete', 'Edit', 'New', 'Copy', 'Save', and 'Quit'.

The bottom screenshot shows the 'Lunch' meal configuration. The 'Meal' dropdown is set to 'Lunch' and the 'Description' field contains 'Lunch'. The 'Page 1' dropdown is also set to 'Lunch'. The 'Button Properties' section shows 'Item' as 'Pizza', 'Caption line 1' as 'Pizza', and 'Caption line 2' as '1.25'. The grid contains buttons for 'Lunch' (teal), 'Milk >ONLY<' (blue), 'Donut, etc .50' (orange), 'Pizza 1.25' (red), 'Milk/Tampico' (red), 'Hoagie 1.50' (orange), 'Hamburger 1.50' (green), 'Fries 1.00' (yellow), and 'Rolls, etc. .25' (purple). The bottom toolbar includes 'Find', 'Delete', 'Undo', 'New', 'Copy', 'Save', and 'Quit'.

Customize your food service **POS Designer** as simple as you can. You will have fewer problems.



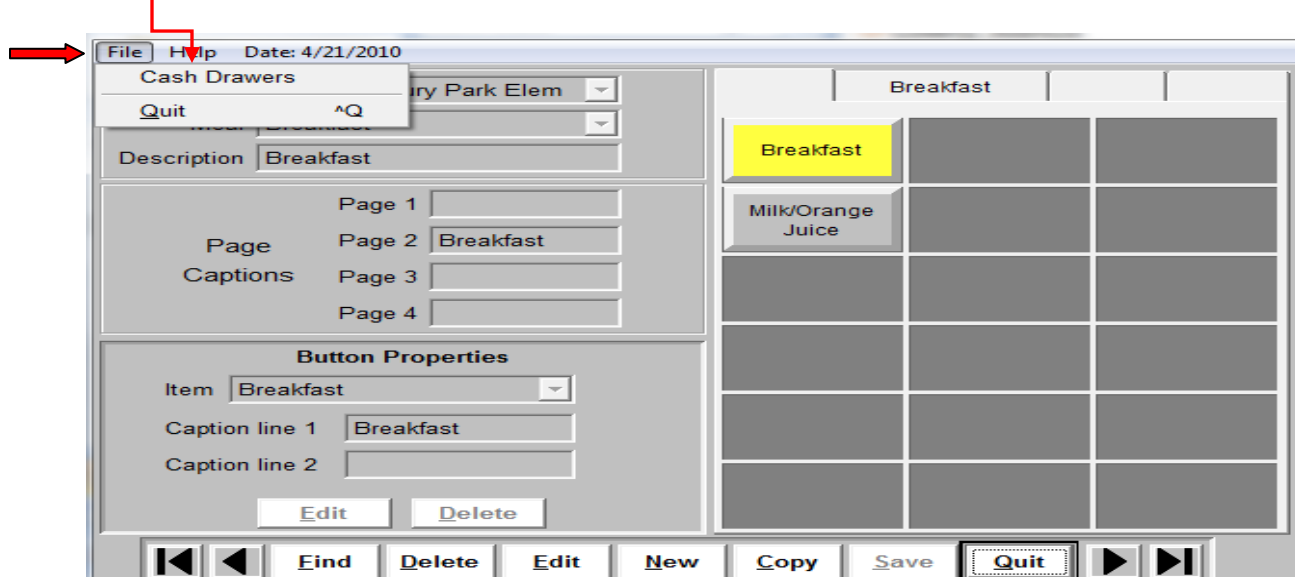
Cash Drawers

Taking **Payments** for **students**, **patrons**, and **faculty** members:

POS Designer Module

Select - File

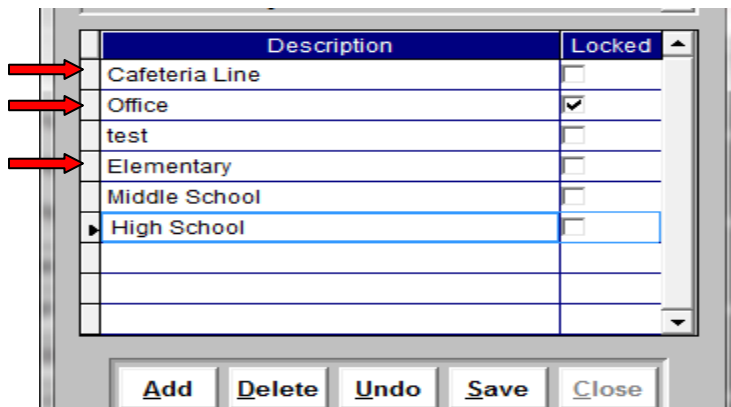
Select - Cash Drawers



Select **E**dit

Select **A**dd

Name the **Cash Drawers**



When naming the **Cash Drawers**, name them in a way that makes sense to your LEA.

Description	Locked
Cashier	<input type="checkbox"/>
Office	<input checked="" type="checkbox"/>
Week of Free Breakfast	<input type="checkbox"/>

Buttons: Add, Delete, Undo, Save, Close

You will notice the **Office Cash drawer** is locked (above)- Only Lock Cash drawers when you no longer use them.



Patrons Module

Patrons are non-student accounts (optional). **Patrons are not eligible** for reimbursable meals.

You do not have to add **Patrons**.

To add a Patron:

Select - **New**

File Reports Date: 4/28/2010

School: [dropdown] Type: [dropdown] Eligible: Never [dropdown]

Ident: 108 Address 1: [text]
 Last: [text] Address 2: [text]
 First: [text] City: [text]
 Middle: [text] State: [text] Zip Code: -
 Gender: <Unset> Lang: <Unset> Phone: () -
 Ethnic: [dropdown]

Notes: [text area]

Activity: None

Buttons: [Previous] [Previous] Find Delete **New** Save Quit [Next] [Next]

Select - **School**

Select - **Type**

File Reports Date: 4/28/2010

School Type Eligible

Ident 109

Last

First

Middle

Temporary Student
Off-site Student
Temporary Faculty
Off-site Faculty/staff member
Faculty family member (adult)
Faculty family member (child)
Other adult

Never

Ident – Start with a number and just keep adding to it – 10000, 10001, etc. for new Patrons

School Type Eligible

Temporary Faculty Never

Ident 10000

Last Wayne

First John

Middle

Gender Male Lang English

Ethnic

Address 1

Address 2

City

State Zip Code -

Phone () -

Notes

Activity: None

Find Delete Edit New Save Quit

Enter **Last** Name

Enter **First** Name

Enter **Gender**

Enter **Lang** (Optional)

Enter **Address 1**

Enter **City**

Enter **State** Enter **Zip Code**

Enter **Phone** Number



Cafeteria Module

Serving Students, Patrons, Faculty through the Cafeteria Module:



Select Cafeteria Module

When first logging into the Cafeteria Module, it is **critical** to make the correct selections.

SIS 2000+ Food Service Cafeteria Login

School: [Dropdown]

School type: Elementary School [Dropdown]

POS Config.: Breakfast [Dropdown]

Cash Drawer: Lline 5 [Dropdown]

Date: 4/28/2010 [Dropdown]

Select Cancel

School: School Name

School Type: Select the **School Type (Meal Rate)** you want charged to students.

School Type reflects the **Rates** charged. (Elementary Student Rates, Middle School Student Rates, High School Student Rates, etc.)

If you are an **Elementary**, or want to charge **Elementary Rates** you will select **Elementary School Type**

If you are a **Middle School** or want to charge **Middle School Rates**, select **Middle School Type**.

If you are a **High School** or want to charge **High School Rates**, select **High School Type**.

SIS 2000+ Food Service Cafeteria Login

School:

School type: **High School**

POS Config.:

Cash Drawer:

Date:

Select Cancel

SIS 2000+ Food Service Cafeteria Login

School:

School type:

POS Config.: **Breakfast**

Cash Drawer:

Date:

Select Cancel

POS Config:

Select what you are serving **Breakfast** or **Lunch**

Select **Cash Drawer** you want the meals to be processed through:

SIS 2000+ Food Service Cafeteria Login

School:

School type:

POS Config.:

Cash Drawer:

Date:

S

Line 5

Line 1

Line 2

Line 3

Line 4

Select **Date**: The date you want the Rates charged to Students, Faculty, Patrons, etc.

SIS 2000+ Food Service Cafeteria Login

School:

School type: High School

POS Config.: Lunch

Cash Drawer: Office

Date: 4/21/2010

Select Cancel

Date: Defaults to today's date – Typically, you will select today's date. If you want to select a different date – select the drop-down arrow and select the date.

Select - **Select**

Account Defaults to **Student**

You can also select **Faculty** or **Patron**

File Settings Volume Sales Reports Date: 4/21/2010 Help

Account: Student

Search Clear

Student Faculty Patron

Meals Remaining

Description	Amount

1st Meal Additional Payment Balance

0.00 0.00 0.00

Message Quit

To select a **Student**: Select **Search**:

You can type in **Last** name or student **ID** - Select **Find**

After selecting a **Student (Joshua B Bade)** – is displayed

Description	Amount
Lunch	Meal

Meal Type	Amount
1st Meal	Yes
Additional	0.00
Payment	0.00
Balance	-11.68

It automatically fills in what **Meal Type** you selected when first logging into the **Cafeteria Module**.

It shows **Meals Remaining** is -5 (-Minus 5)

Meal Description – Lunch

1st Meal - Yes– This is his 1st Meal today

Additional – 0.00 – This is if the student is having a second meal or ala Carte Item

Payment – 0.00

Balance - \$-11.68

You can either **Save** this transaction which will follow through with the meal purchase and charge the student **or**

Reset - Will remove the student from the student selection and return the screen back to blank without charging the student **or**

Undo -will remove the meal that is listed in the **Description** and leave the student selected

ala Carte Item - If you want to charge the student for an ala Carte Item, click on the **ala Carte** button created in the POS Designer

ala Carte Items - Milk >ONLY< - Clicking on the **ala Carte** button will add the ala Carte Item in the **Description** and Show the **Amount (.25)** charged

Additional - 0.25

If you **select** and **high-light** the **Description - Lunch** - it will also remove it

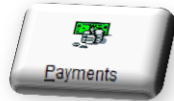
If you select the button Milk >ONLY< - it will charge him for 1 Milk - ala Carte

It will do the same if you click on the other ala Carte Buttons.

If you select **Lunch** Button when Lunch is already listed in the **Description**, it will charge him for two lunches.

Save - to save transaction

Repeat the steps to continue with the next student.



Payments Module

SIS2000+ Food Service Payments

School: Sani- [] Scho []

Cash Drawer: []

Trns Default: Office Payment

Date: 4/23/2010 []

[Select] [Cancel]

Select **School** :

Select the **Cash Drawer** you want to have the **Payments** processed through.

Select the **Trns Default** – (Transaction Default) to have the **Payments** processed through

Select the **Date** – you want to show the date **Payments** are made

Select_ - **Select**

SIS2000+ Food Service Payments - Sani-...

File Help Date: 4/23/2010

Account: Student Ident: [] Search Clear

☒ School ☐ Current
☐ District ☐ All

Today's Payments

Transaction	Amount

Balance: 0.00

Payment Memo

[Cancel] [Save] [Quit]

Electronic Transfer Payments

Select **Account** Type – Account defaults to **Student**

Type in **Student Ident** – Select **Search**

If you don't know the Student **Ident**, select **Search**, it will bring up a Student Search Window.

The screenshot shows the 'SIS2000+ Food Service Payments' window. At the top, there's a menu bar with 'File' and 'Help', and a date field showing '4/23/2010'. Below the menu bar, there's a section with 'Account' and 'Ident' fields. The 'Account' dropdown is set to 'Student'. To the right of these fields are 'Search' and 'Clear' buttons. Below this section are radio buttons for 'School', 'District', 'Current', and 'All'. The 'School' radio button is selected. Underneath is a table titled 'Today's Payments' with columns 'Transaction' and 'Amount'. To the right of the table is a 'Balance' field showing '0.00'. Below the table is a 'Payment Memo' field. At the bottom are 'Cancel', 'Save', and 'Quit' buttons, and a button labeled 'Electronic Transfer Payments'.

Student Search Window:

The screenshot shows the 'Student Search Window'. It has a 'Student' dropdown menu at the top. To its right are buttons for 'School', 'Active', 'Find', and 'Cancel'. Below the 'Student' dropdown are input fields for 'ID', 'Last', and 'First'.

To search By Selecting School, it will change the School Type

It will change from **School** Type to **District** Type

This is used if you have a student who is not enrolled in your school but, is enrolled within the District and you are serving them a meal. You will be able to find their name and charge them for the meal.

This screenshot is similar to the previous one, but the 'District' button is selected instead of 'School'. Red arrows point to the 'District' button, the 'Find' button, and the 'Last' and 'ID' input fields.

Type in Student ID or Student Last Name and select **Find**

Select the student you need to enter a **Payment** for.

School	Ident	Name
106	30521	Baalman, Bennu
104	18830	Baalman, Rebecka
720	12467	Babb, Aymara
108	20246	Babb, Finau
106	26290	Baber, Michael (Derek)
714	6619	Babington, Kensi
108	17872	Babington, Mo
134	19516	Babysitter, Lynae
134	28127	Babysitter, Natalie Jo

269

Select **Cancel**

SIS2000+ Food Service Payments - Sani...

File Help Date: 4/23/2010

Account Ident

Student 19516 Search

Babysitter, Lynae (134) M Clear

☐ School ☐ Current

☒ District ☐ All

Today's Payments

Transaction	Amount
Office Payment	50.00

Balance: 52.00

Payment Memo

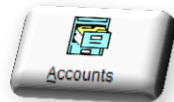
Cancel **Save** **Quit**

Electronic Transfer Payments

Select the Type of **Transaction** in the drop-down menu below **Today's Payments**. (Office Payment)

Type in the **Amount** of the Transaction (50.00) and **Save**.

Balance: of the **Student** Account will show.



Accounts Module

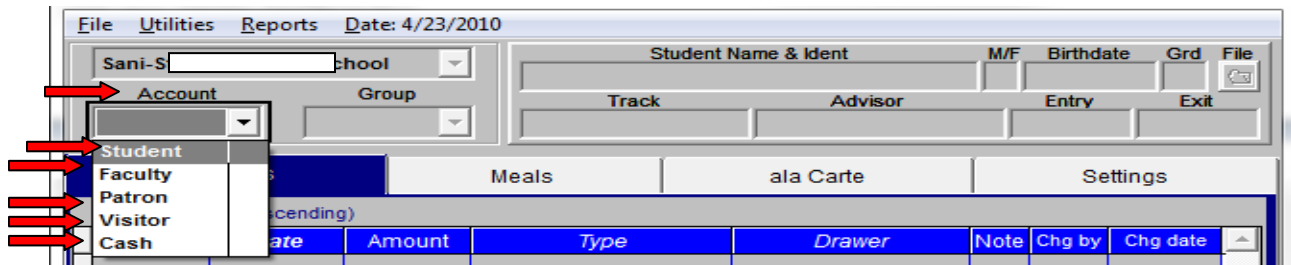
Another place to put in **Payments** is in the **Accounts** Module.



You can do multiple types of transactions in the **Accounts Module**:

Enter **Status** - Free, Reduced, and Full Pay **Account Types**, Enter **Payments**, Enter **Meal, ala Carte** Transactions, and Student **Settings**

From the **Account** Menu – Select: **Student, Faculty, Patron, Visitor, or Cash**



Student – Accounts – Students enrolled in your LEA

Faculty - Accounts – Faculty Members of your LEA (Employed by your LEA).

Faculty Accounts – are **non-reimbursable meals**.

Patron - Accounts – Volunteers, Parents, etc. who are not employed by your LEA.

Patrons Accounts – are **non-reimbursable meals**.

Visitor - Accounts – Volunteers, Parents, Adult, Child, etc.; who are not employed by your LEA.

Visitor Accounts – are **non-reimbursable meals**.

Cash - Accounts – Can be a Faculty Member, Student, Volunteers, Parents, etc.

Cash - Accounts are **non-reimbursable meals**.

Account - Student - Status Tab

File Utilities Reports Date: 4/23/2010

Sant School

Student Account Group This Year

Student Name & Ident: Abegg, Shayleigh Nicole [21656] M/F: F Birthdate: 9/13/1995 Grd: 9 File

Track: A 720 09/10 Advisor: McClung, Vivien Entry: 8/24/2009 Exit:

Status Payments Meals ala Carte Settings

All 2009-20

Effective	Expire	Pay type	Application	Status	Chg by	Chg date	Note	Adj
8/22/2005	6/30/2006	Free	[O] 10803	Approved	RobEI	8/29/2005		
7/1/2006	9/1/2006	Free	[Y] 10803	New Year Temporary	NewYr	8/4/2006		
9/2/2006	6/30/2007	Reduced	[R] 10803	Approved	PalCa	8/23/2006		
7/1/2007	8/10/2007	Reduced	[Y] 10803	New Year Temporary	NewYr	7/30/2007		
8/11/2007	6/30/2008	Reduced	[R] 10803	Approved	PalCa	8/10/2007		
7/1/2008	10/2/2008	Reduced	[Y] 10803	New Year Temporary	NewYr	7/18/2008		
10/3/2008	6/30/2009	Reduced	[R] 10803	Approved	SmiGa	10/3/2008		
7/1/2009	8/27/2009	Reduced	[Y] 10803	New Year Temporary	NewYr	7/22/2009		
8/28/2009	6/30/2010	Reduced	[R] 10803	Approved	PalCa	8/27/2009		

Add Delete Application 9

Payments 37.01 Meals 28.80 Ala Carte 2.00 Balance 6.21

Report Letter Find Edit Save Quit

Shows:

Effective Date for Pay Type– 8/22/2005 (Pay Type: Free, Reduced, Full-pay - effective)

Expire Date for Pay Type - 6/30/2006 (Pay Type: Free, Reduced, Full-pay expired or changed)

Pay Type – Free (Reduced, Full-pay)

Application – Approved ID Number - system assigned

Status – Approved (New Year Temporary, Denied) Eligibility Application

Chg By ((Data Changed By) – RobEI

Chg Date – 7/22/2009 (Data Changed)

Note – If there is information about the transaction

Adj – Adjustments, if there were any made

Account - Student - Payments Tab

File Utilities Reports Date: 4/23/2010

Sani: [] School: []

Account: Student Group: This Year

Student Name & Ident: Aakinsen, Sabryna [7013] M/F: F Birthdate: 2/28/1993 Grd: 11 File: []

Track: A 720 09/10 Advisor: Conolly, Cherity Entry: 8/24/2009 Exit: []

Status: Payments Meals ala Carte Settings

Sorted by Date (Ascending)

Loc	Date	Amount	Type	Drawer	Note	Chg by	Chg date
000	7/1/2009	1.20	Balance Forward	<Unset>		NewYr	7/22/2009 1
720	8/27/2009	2.00	Lunch line pmt	Line 3		BisKa	8/27/2009 1
720	8/28/2009	2.00	Lunch line pmt	Line 1		BisKa	8/28/2009 1
720	9/2/2009	.50	Lunch line pmt	Line 4		BisKa	9/2/2009 12
720	9/2/2009	1.00	Brkfst line pmt	Line 6		BisKa	9/2/2009 12
720	9/16/2009	1.00	Lunch line pmt	Line 4		BisKa	9/16/2009 1
720	9/17/2009	30.00	Lunch line pmt	Line 2		BisKa	9/17/2009 1
720	10/28/2009	20.00	Lunch line pmt	Line 2		BisKa	10/28/2009

Add Delete

Payments 57.70 Meals 52.85 Ala Carte 3.50 Balance 1.35

Report Letter Find Edit Save Quit

Shows:

Loc (Location – School ID Number) - 000

Date - 7/01/2009 (Date Payment was added to the student account)

Amount - 1.20 (Payment amount added to the student account)

Type - Balance Forward (from previous school year, Payment added in lunch line, breakfast line, etc.)

Drawer - <Unset> (If it is a balance forward from previous year, otherwise it will show the Cash Drawer the Payment was added through)

Note - If there is information about the Payment transaction

Chg by - New Year (New Year Roll Over or who the cashier was taking the Payment)

Chg Date - 7/22/2009 -(Data Changed)

Account - Student - Meals Tab

File Utilities Reports Date: 4/23/2010

San [] School []

Account [] Group []

Student [] This Year []

Student Name & Ident: Aakinsen, Sabryna [7013] M/F: F Birthdate: 2/28/1993 Grd: 11 File: []

Track: A 720 09/10 Advisor: Conolly, Cherity Entry: 8/24/2009 Exit: []

Status: [] Payments: [] **Meals** [] ala Carte [] Settings []

Sorted by Date (Ascending)

Loc	Date	Meal	Pay type	Drawer	Item	Amount	Reim	Worker
720	8/27/2009	Lunch	Full-pay	Line 3	Lunch	1.85	✓	
720	8/28/2009	Lunch	Full-pay	Line 1	Lunch	1.85	✓	
720	9/2/2009	Breakfast	Full-pay	Line 6	Breakfast	1.05	✓	
720	9/2/2009	Lunch	Full-pay	Line 4	Lunch	1.85	✓	
720	9/16/2009	Lunch	Full-pay	Line 4	Lunch	1.85	✓	
720	9/17/2009	Lunch	Full-pay	Line 2	Lunch	1.85	✓	
720	9/21/2009	Lunch	Full-pay	Line 4	Lunch	1.85	✓	
720	9/23/2009	Lunch	Full-pay	Line 2	Lunch	1.85	✓	
720	9/29/2009	Lunch	Full-pay	Line 3	Lunch	1.85	✓	

29

Payments: 57.70 Meals: 52.85 Ala Carte: 3.50 Balance: 1.35

Report Letter Find Edit Save Quit

Shows:

Loc (Location - School ID Number) - 720

Date - 8/27/2009 (Date Meal was served)

Meal - Lunch (Breakfast) - Meal Type

Pay Type - Full-pay (Free, Reduced)

Drawer - Line 3 (Cash Drawer meal was processed through) - Cash Drawer processed through

Item - Lunch (Breakfast, ala Carte Item)

Amount - 1.85

Reim (when checked ☒ - this meal is eligible as a **Reimbursable Meal**)

Worker - (Was a worker meal when checked ☒) Not a **Reimbursable Meal**

Account – Student - ala Carte Tab

File Utilities Reports Date: 4/23/2010

Sani: [] School: []

Student Name & Ident: Aakinsen, Sabryna [7013] M/F: F Birthdate: 2/28/1993 Grd: 11

Track: A 720 09/10 Advisor: Conolly, Cheryl Entry: 8/24/2009 Exit: []

Account: Student Group: This Year

Sorted by Date (Ascending)

Loc	Date	Meal	Drawer	Item	Amount
720	9/17/2009	Lunch	Line 2	Pizza	1.75
720	10/8/2009	Lunch	Line 2	Pizza	1.75

Edit Add Delete

Payments: 57.70 Meals: 52.85 Ala Carte: 3.50 Balance: 1.35

Report Letter Find Edit Save Quit

Shows:

Loc (Location – School ID Number) - 720

Date - 9/17/2009 (Date Meal was served)

Meal – Lunch (Breakfast)

Drawer – Line 2 (Cash Drawer meal was processed through)

Item - Pizza

Amount – 1.75

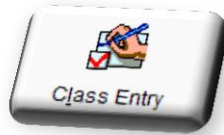
Displayed on ALL Account screens: Status, Payments, Meals, Settings

Payments – 57.70

Meals – (Total of all meals for the year) - 52.85

Ala Carte -(Total of all Ala Carte Items for the year) -3.50

Balance – 1.35



Class Entry Module

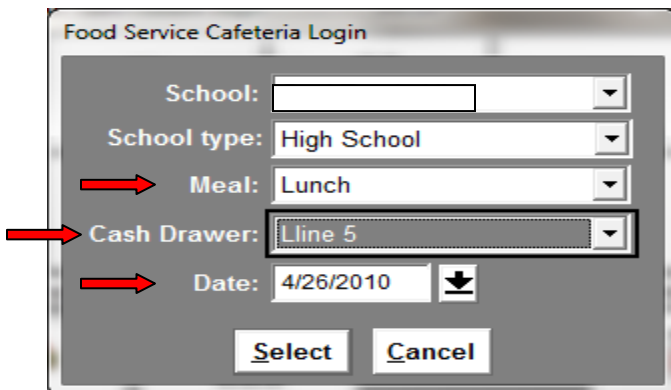
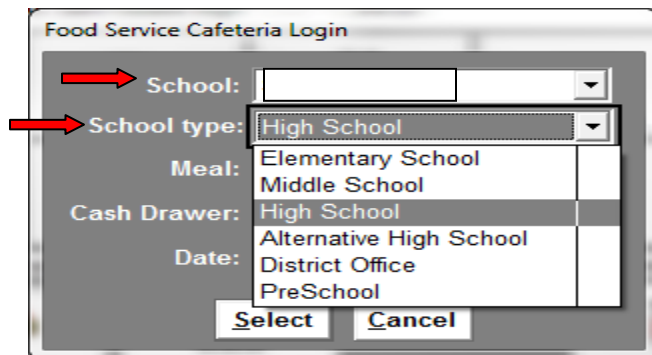
Class Entry is for entering student meal transactions by Class (teacher)

You enter the module the same way as you do the **Cafeteria Module**:

Select **School**

Select - **School Type** (Meal Rate) you want charged to students.

School Type reflects the **Rates** charged. (Elementary Student Rates, Middle School Student Rates, High School Student Rates, etc.)



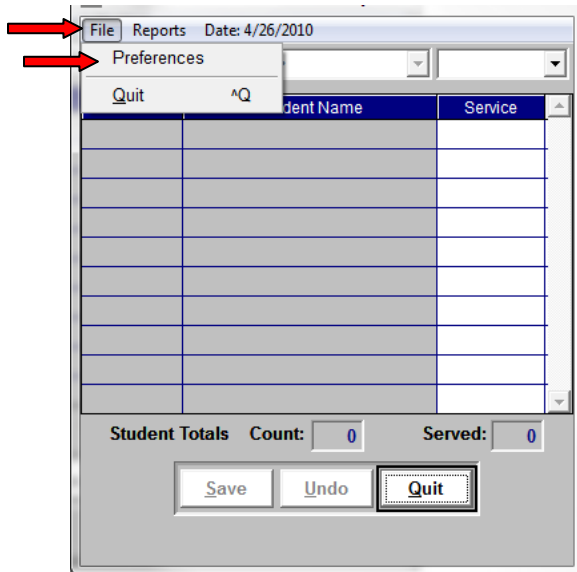
Select - **Meal Type** - **Lunch (Breakfast)**

Select - **Cash Drawer** - (Cash Drawer meal is processed through)

Select - **Date** - Meal transactions will be processed

First time going into **Class Entry**, setup the **Preferences**:

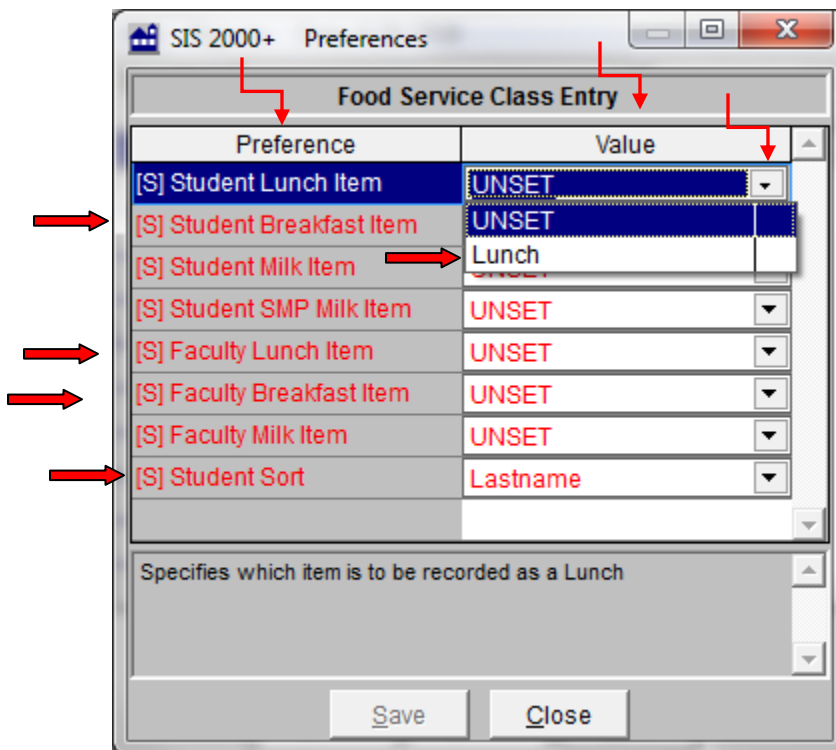
Select - **File - Preferences**



Go down through each listed Preference item and select the Value in the drop-down menu:

If you are not going to use some of the Preferences, you can leave them **UNSET**

Student Sort – Select - **Lastname**



This is how it should look if you use all Preference Items but the SMP Milk Item:

Preference	Value
[S] Student Lunch Item	Lunch
[S] Student Breakfast Item	Breakfast
[S] Student Milk Item	Milk >ONLY<
[S] Student SMP Milk Item	UNSET
[S] Faculty Lunch Item	Lunch
[S] Faculty Breakfast Item	Breakfast
[S] Faculty Milk Item	Milk Only
[S] Student Sort	Lastname

Save Close



SMP Milk -

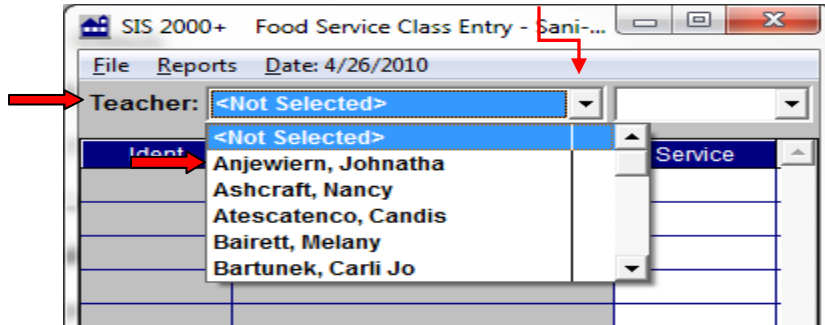
The (S) Student SMP Milk Item is UNSET.

Leave this UNSET unless you use SMP Milk

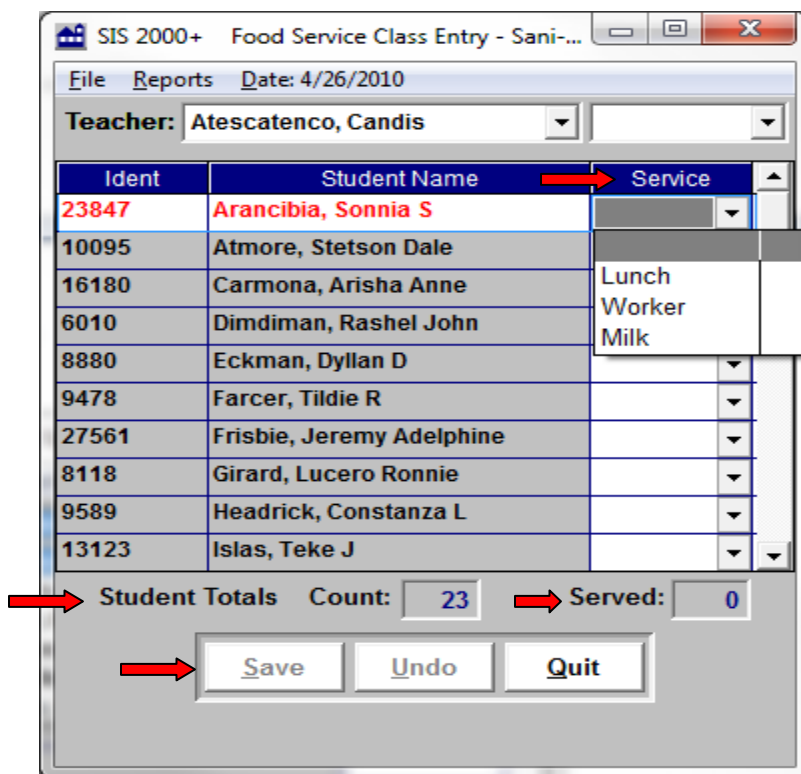
SMP Milk is only used if you participate in the **Special Milk Program (SMP MILK)**. This is **a reimbursable Milk Item**.

To use **SMP Milk** – contact **Child Nutrition Services** for more information at (801) 538-7680, otherwise do not select it and set it up.

After selecting the Values and saving the setup, you will be able to select the Teacher you want to enter meals for and the Students in the teacher's class will be listed.



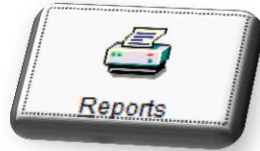
Select the Service – Lunch, Breakfast, Worker, Milk



Select the drop down for each student's meal type .
Add each student who is served and Save.

Student Totals : Count – 23 (Number of students enrolled in the Teacher's Class)

Served: (Number of students served the Meal Item)

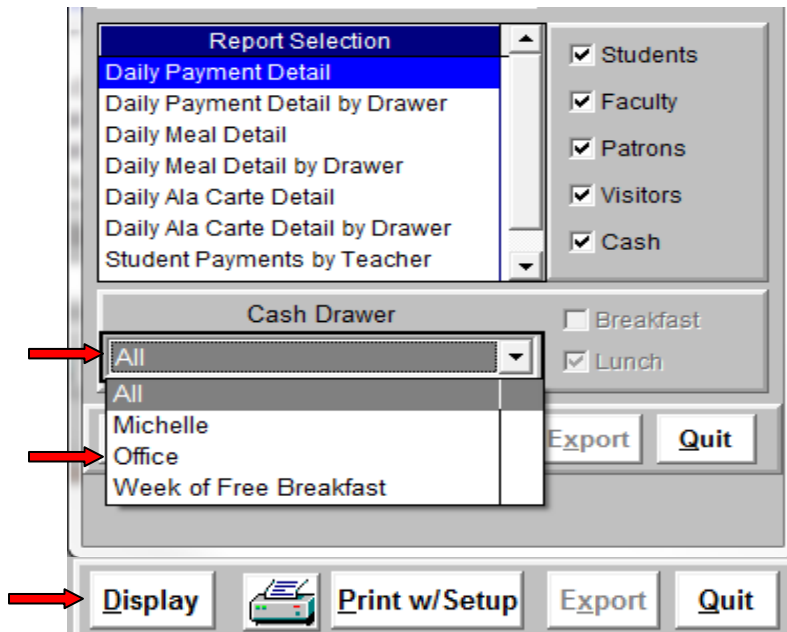


Reports Module



Daily Detail Reports -

Report Selection



You can select All or each Cash Drawer for Reports

Select **D**isplay

The Report you high-lighted will open.

To enlarge view – Click on the corner square

Report Designer - paytran.frx - Page 1 - SIS2000+ Daily Detail Reports - [2009 / 2010]

File Edit Window Help

Print Preview

5/5/2010 Daily Payment Detail Page 1

High May 05, 2010

Student	Payment	Description	Draver
	15.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	15.00	Lunch line pmt	Michelle
	10.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	20.00	Lunch line pmt	Michelle
	5.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	30.00	Lunch line pmt	Michelle
	30.00	Lunch line pmt	Michelle
	4.00	Lunch line pmt	Michelle
	10.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	10.75	Lunch line pmt	Michelle
	2.25	Lunch line pmt	Michelle
	37.00	Lunch line pmt	Michelle
	3.00	Lunch line pmt	Michelle
	20.00	Lunch line pmt	Michelle
	20.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	10.00	Lunch line pmt	Michelle
	252.00		
		Payment Description Draver	
	20.00	Brkfst line pmt	Michelle
Faculty totals:	20.00		
Report Total:	272.00		PayTran

To Print Report: Close the Views showing the Report by Clicking on the 'X' in the corner window.

Report Designer - paytran.frx - Page 1 - SIS2000+ Daily Detail Reports - [2009 / 2010]

File Edit Window Help

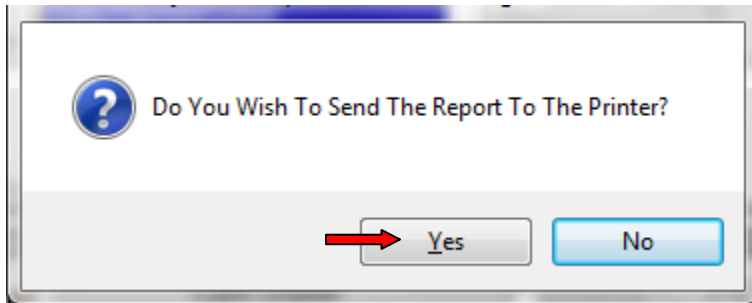
Print Preview

5/5/2010 Daily Payment Detail Page 1

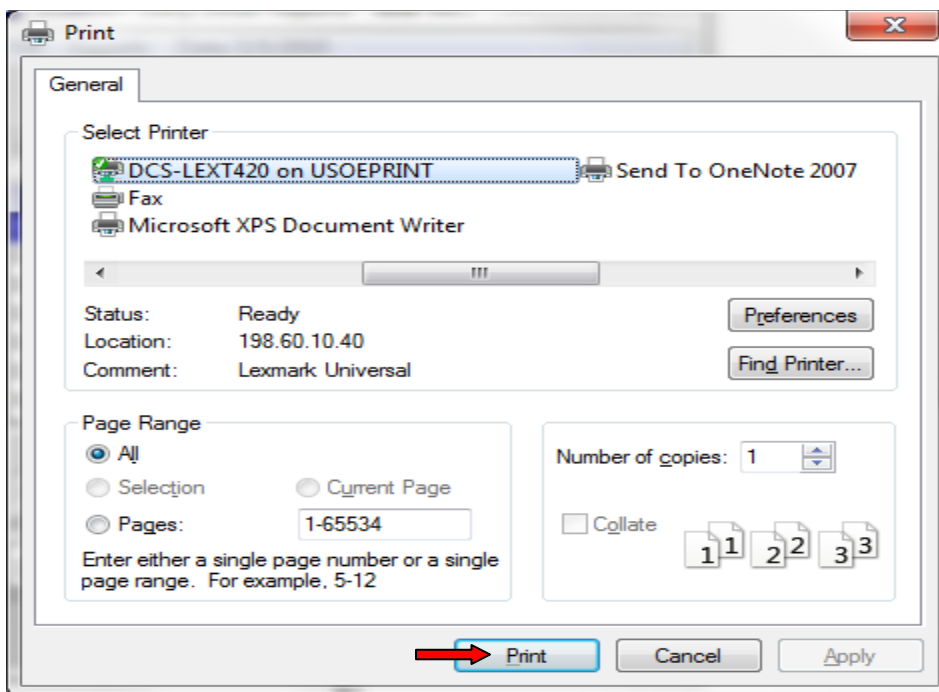
High May 05, 2010

Student	Payment	Description	Draver
	15.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	15.00	Lunch line pmt	Michelle
	10.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	20.00	Lunch line pmt	Michelle
	5.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	30.00	Lunch line pmt	Michelle
	30.00	Lunch line pmt	Michelle
	4.00	Lunch line pmt	Michelle
	10.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	10.75	Lunch line pmt	Michelle
	2.25	Lunch line pmt	Michelle
	37.00	Lunch line pmt	Michelle
	3.00	Lunch line pmt	Michelle
	20.00	Lunch line pmt	Michelle
	20.00	Lunch line pmt	Michelle
	2.00	Lunch line pmt	Michelle
	10.00	Lunch line pmt	Michelle
Student totals:	252.00		
Faculty		Payment Description Draver	
807040118 Petersen, Eldon	20.00	Brkfst line pmt	Michelle
Faculty totals:	20.00		
Report Total:	272.00		PayTran

Continue Clicking on the 'X' in the corner window until all windows are closed and the Print Dialog Box comes up:



Select Yes



Select Print to send the Reports to the Printer.

Repeat this process for all Food Service Reports

